DISCARD 101

It is helpful to add the ***Item Remove*** button to your toolbar before getting started. You can also access this feature on the Circ Toolbar by clicking the *Item Information & Maintenance* Wizard (open book icon), and then clicking the *Remove Title, Call Numbers, or Copies* Button (open book w/ red X icon.)

Discarding a paperback:
Remove from system. MPL does not catalog or upload paperbacks to OCLC.

1. Make sure item is checked-in.
2. Set the *Item Remove* button properties to search by **Item ID** (right-click button, select Properties from menu, & select Item ID for *Preferred search index*.
3. Search for item using *Item Remove* button: scan barcode and click *Remove Item*. You may have to click *Remove Copy or Remove Title* a couple times if warning messages appear.

Discarding Serials – See Gail

Discarding something other than a paperback or serial:
Change home location to discard, check-in, and determine if item is last copy held.

1. **If you have multiple items to discard**, click the *Edit Copies Globally* Button
   Check mark the *Edit Home Location* Box under the *Edit Global Values* Heading. Select DISCARD from the *New home location* drop down menu. Click *OK*. Scan barcodes of items that need to be discarded.
2. **If you have a single item to discard**, click the *Edit Copy* Button, search for item, and change home location to DISCARD then click *OK*.
3. Check-in items if necessary.
4. Set the *Item Remove* button properties to search by **Title** (right click button, select *Properties* from menu, & select *Title* for Preferred search index.)
5. Search for item using the *Item Remove* button: type in title (if you changed the home location of the item first as earlier step directed, then the title you are searching for should appear at the top of your search results regardless of pub date order, thus eliminating the hassle of scrolling down a long list.)
6. Highlight title you need and click *View*. You may have to click the *All Volumes* Tab to see the item you are looking for.
7. Determine whether or not item is the last copy held by your library and proceed using the following scenarios…

Discard Scenarios

Scenario #1
If multiple non-paperback copies are held by individual library:
If you are **certain** there are multiple <u>non-paperback</u> copies at your library go ahead and remove the item:

1. Check Mark box to the right of item, then click the *Remove Item* Button below.
2. The *Remove Item: Complete* Menu will appear, you can select *Return to Volume List* to review, or select *Lookup another Title* to search for next item.

Scenario #2
If item is the LAST non-paperback copy held by individual library:
DO NOT REMOVE! The last copy needs to be included in the monthly discard report run by Helena in order for holding to be removed from OCLC**.**

1. Be sure you have looked up item by **title**
2. Make sure home location is changed to DISCARD
3. Make sure item is checked-in

Scenario #3
If item is the LAST non-paperback, with a paperback copy also attached:
Ignore the paperback and treat item as if it were the Last Copy held, follow Scenario #2 instructions.

Scenario #4
If item is the LAST copy held by individual library and librarian has requested that a new copy is ordered:

1. Have acquisitions staff order a new copy that matches the bib record before removing. Bibs need to match! Once a new 'on-order' copy exists, you may remove the old copy by following **Scenario #1** instructions.
2. If the new 'on-order' copy does <u>not</u> match existing bib, i.e., a paperback or new edition is being ordered instead, do not remove item. Follow the **Scenario #2** instructions for the LAST copy held.

Discard Troubleshooting

If the system will not allow removal of an item…

You will not be able to remove an item if it is currently checked-out (charged), or has bill(s) or hold(s) attached.

If item is charged

Check item in and proceed with removal as outlined in scenarios above.

If item has an overdue bill –overdue bills only, not damage or ILL etc

Look up overdue bill, waive overdue bill if less than $10, and then remove item.

1. Look up item using the *Item Search and Display* wizard.
2. Search using **Item ID**.
3. There should be a series of 6 tabs showing in the item display: *Control, Bib, MARC Hldgs, Vol/Copy*, Circ Info, & >>>.* Click on the '>>>' tab located on the far right to take you to the next set of tabs.
   [*If the *All Volumes* Tab appears instead of *Vol/Copy*, click on it, then click on item you need to remove bill from so that it is selected/highlighted (if white box appears, just click somewhere outside box so that it disappears.) With item highlighted in blue, click the *Display Copy* Button, then click on the ">>>" tab.]
4. Select the *Bills* Tab. Here you will be able to see who has a bill attached to your item. **If your item has an overdue bill greater than $10, change the Home Location to PROBLEM & be sure item is checked-in.**
   (Note: Holdings of Last Copy PROBLEM items will have to be manually deleted from OCLC.)
   If your item has an overdue bill less than $10, continue on with the following steps.
5. Click on a patron barcode/name to highlight it.
6. Leave the *Display Item* Screen open. Go to your toolbar to select the *Pay Bill* Wizard (dollar bill w/hand icon.)
7. The patron barcode you highlighted should automatically appear in the *Paying Bills: Identify User* Screen. Click *OK*.
8. The *Paying Bills* Screen will appear listing all of the patron's bills. You need to scroll down until you find the bill that applies to your item.
9. Type in the amount owed <u>under the title</u> in the *Payment* Box, then tab over to the *Payment Type* Box and select or type WAIVED. Click *OK*, and then click *Close*.
10. If more than one patron has a bill attached to your item, go back to the *Display Item* Screen that was left open in step 4, and highlight the next patron name. Repeat steps 5-9 until all bills attached to your item are cleared.
11. Once bills are gone, you may try removing item again.

Discard Troubleshooting cont.

If item has hold(s)

If item has multiple copies with hold(s) attached
Print list of hold(s), remove hold(s), remove/discard item, and then replace hold(s) on remaining title(s).

1. Click *Holds Information & Maintenance* Wizard on toolbar (lock & key icon.)
2. Click *Remove Item Hold* Button (book with unlatched lock icon.)
3. Search for item by Item ID.
4. Print the hold list or copy down patron names & library card number. You'll also want to get in the habit of making note of the pick-up library the patron has selected. Do this by clicking on '*unavailable*' located below '*Status*' on the hold list. The pick-up library info will appear in the lower right corner of the white pop-up box.
5. Remove holds by check marking the *Remove* Box to right of patron and clicking *OK*, or by clicking the *Remove All* option at top of screen and then clicking *OK*.
6. Once holds have been removed, you may remove your item following Scenario #1 instructions **only if there are multiple copies of title you're trying to remove**.
7. After item is removed, you must put holds back on remaining title(s).
8. Click *Holds Information & Maintenance* Wizard on toolbar (lock & key icon.)
9. Click *Place Hold* Button (lock icon.)
10. Look up each patron from step 4 in the order they are listed using name or library card number.
11. To place hold on title, search by title. A title list will appear if more than one copy is in the system. Click *Place Hold on Selected Item* Button if necessary.
12. Select appropriate pick-up library and click *OK*.
13. Click *Place Hold for Another User* Button if other patrons need holds replaced. Repeat steps 10-12 until all patrons from step 4 have holds replaced.

If item is the last copy available with hold(s) attached
Alert selector that last copy has a hold and find out if they want to reorder.

1. If selector does **not** want another copy then put a note on patron's record to alert them that the item is no longer available and that they may wish to try ILL services. Then remove hold as explained above in steps 1-5. Last copy items should not be removed from system, see **Scenario #2** instructions.
2. If selector wants another copy ordered to fill hold request, make sure your acquisitions staff person orders a new copy. Once a new 'on-order' copy exists, you may remove the hold from the old copy and transfer hold to the new 'on-order' item. Once hold is transferred to the 'on-order' copy you may remove item, see **Scenario #4** instructions.

Discard Scenario Examples

Scenario #1 Example: MSLA-MAIN   Adventures of Huckleberry Finn

> TWAIN
> > Copy 1: 33144004153547 BOOK(RESHELVING)
> > Copy 2: 33144003091581 BOOK(CHECKED-OUT) can't circ
> > Copy 3: 33144003384986 BOOK(DISCARD)

In this example there are multiple non-paperback copies listed. We want to remove the 'DISCARD' copy at this point. If we do not remove it, then the OCLC holdings will be removed at the beginning of the next month, and our library's holdings will be inaccurate since two other copies exist. Is this a huge deal? It can be, especially where ILL is concerned. We also want to strive to have as clean a database as possible.

Scenario #2 Example: MSLA-MAIN   Adventures of Huckleberry Finn

> TWAIN
> > Copy 1: 33144004153547 BOOK(DISCARD)

Here we only have one copy left attached to a bib record. This item needs to remain in the system with Home Location of 'DISCARD' so that it will be included in the monthly discard report. Once the OCLC holding is updated, Helena will generate report to remove the item from our system.

Scenario #3 Example: MSLA-MAIN   Adventures of Huckleberry Finn

> TWAIN
> > Copy 1: 33144004153547 BOOK(DISCARD)
>
> PBK
> > Copy1: 33144003091581 BOOK (CHECKED-OUT) can't circ
> > Copy2: 33144003384986 BOOK (PAPERBACK)

In this example we are trying to discard a hardback that also has paperback copies attached to the hardback bib. If we removed the hardback copy at this point, then our library's OCLC holdings would still show that we have the hardback edition, when in actuality there are only paperbacks remaining. (Remember, MPL doesn't catalog or upload paperbacks to OCLC.) In this instance we will ignore the paperbacks and follow instructions from Scenario #2 so that the hardback bib will be included in the monthly discard report run by Helena.

Scenario #4 Example: MSLA-MAIN   Adventures of Huckleberry Finn

> TWAIN
> > Copy1: 33144004153547 BOOK(DISCARD)
> > Copy2: XX(5410-9445)   BOOK(ON-ORDER)

Only one copy of Mark Twain's classic left! This can't be allowed says our librarian. We must order additional copies! Once an 'ON-ORDER' copy is added (as displayed above) we can remove the 'DISCARD'. This way our OCLC holdings will not be affected and our patron's can still enjoy Huck Finn's zany adventures.

Hey Sarah & Paulette,

Here are the discard instructions I created to help others at MPL learn how the whole discard procedure operates (at least for now.) I apologize for not sending it to you sooner. I tried a step-by-step approach that is why there are five pages worth. Hopefully the directions aren't too tedious.

Anyway, you can go over this if you like and check to make sure that it is consistent with consortium standards. If you see anything out of place let me know and I will correct it. Suggestions are most welcome. Also, if deemed appropriate, these instructions can be changed to be more generic so that any library may use them. Obviously, the section on page 3 concerning waiving overdue fees was written according to MPL policy, so that section and others would have to be tweaked in order to fit various library policies.

Let me know if this helpful or just plain confusing.
Thank you for all your hard work and time spent answering my questions and keeping Montana libraries up and running!

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